

Washington State Libraries Marketing Initiative Baseline Attitude & Usage Study

August, 2004



Contents

Purpose & Objectives	3
Methodology	4
Library Usage	5
Perceptions and Attitudes about Libraries	13
Conclusions & Implications	26
Demographics	32



Purpose & Objectives

The purpose of this study is to:

- **Identify existing attitudes, perceptions and usage of Washington State libraries and their services.**
- **The objective is to create a baseline of intelligence for future measurement in order to determine shifts in these measures and gauge the effectiveness of the library marketing initiative.**



Methodology

Technique:	Telephone interviews – random digit dial
Participants:	201 Washington State residents
Criteria:	Households with children to age 18 living at home Representative of states demographics Not employed within the library system
Interview Length:	Approximately 11 minutes
Statistical Reliability:	At the 95% confidence level, a sample of 200 is reliable within $\pm 7.1\%$ points.

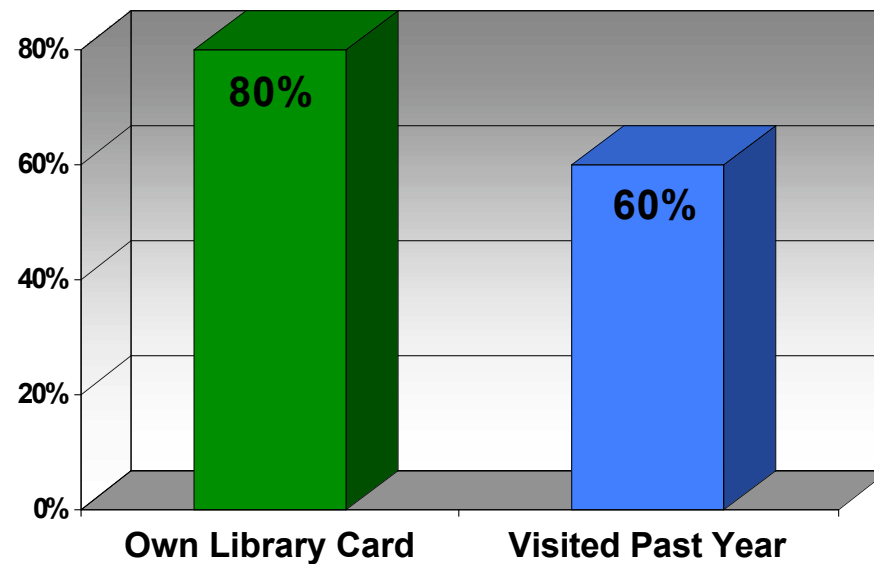


Library Usage



Majority are Library Patrons and Card Owners

- The majority of the target group owns a library card (80%).
- More than half of the target group visited a library in the past year (60%).
- 68% of library card owners visited a library in the past year.



Q1. Do you own a library card? Base: 201

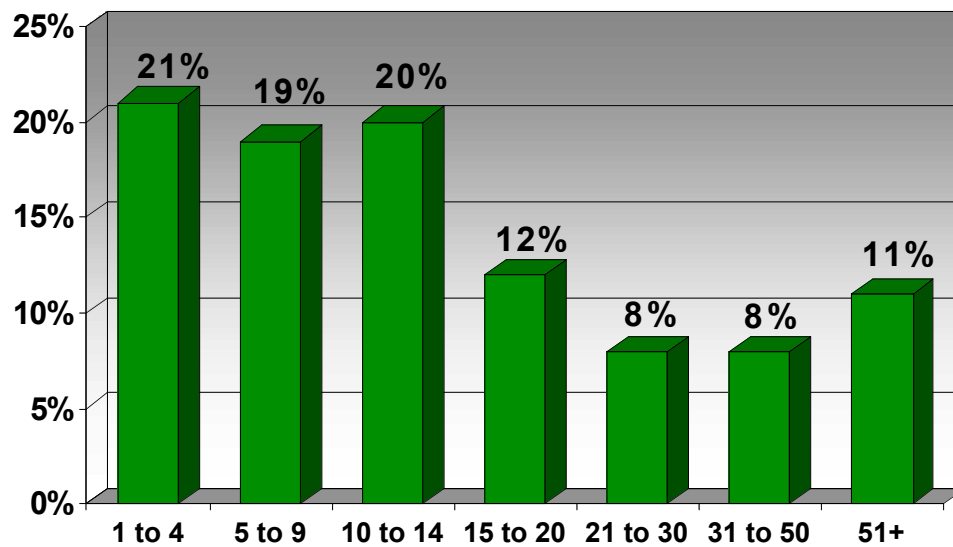
Q3. Have you visited a library or used library services on the Internet in the past year? Base: 201



Library Usage – Personal Visits

- While the average number of personal library visits/year averages 22.2, more than 10% of the patrons visit 51 times or more.
- Borrowing items is the largest service used, while approximately 1/3 connect to the Internet and utilize children's activities and programs.

Library Visits/Year



Services Used During Visit

Borrow books	89%
Consult librarian	68
Borrow CDs, videos, software	52
Use reference materials	47
Read newspapers/mags	43
Connect to Internet	36
Children's activity/program	35
Attend program/event/workshop	25

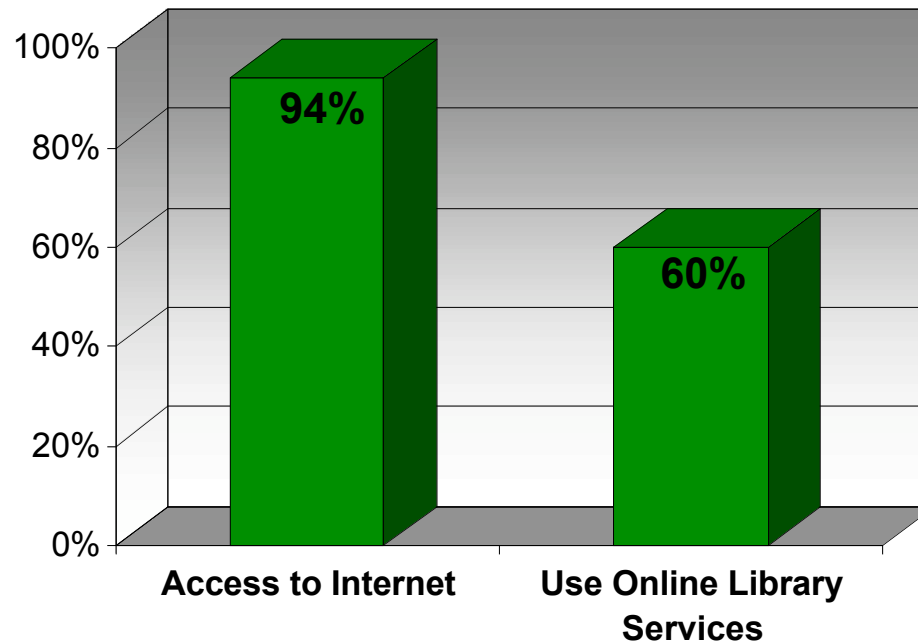
Q4. How many times did you personally visit a library in the past year? Base: 120 – those who visited

Q5. When you visited a library in the past year, which of the following services did you use? (AIDED) Base: 120 – those who visited



Online Access – A Viable Connection to Patrons

- The majority of the target has access to the Internet (94%)
 - 66% both at home and work; 28% at home only; 1% at work only
- Of those, 60% have accessed library services online
- This presents opportunity for increased library access via the Internet



Q6. Do you have access to the Internet? Base: 120 – those who visited

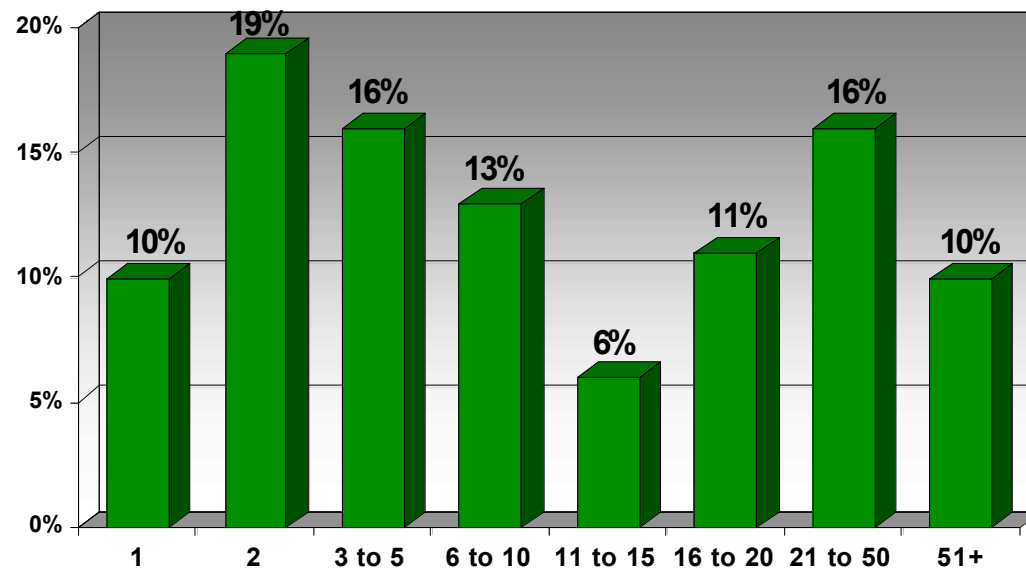
Q7. Have you used a computer to go online to use library services in the past year? Base: 113 – visitors with computer access



Library Usage – Online Visits

- The average number of online library visits is 19.0 per year, which is slightly less than personal visits. Online visits are primarily to access the computer catalog – with less librarian contact.
- This presents a significant opportunity to increase awareness, usage, and perceived value of online library access.

Online Visits/Year



Services Used Online

Used computer catalog	90%
Renewed books online	49
Used other webpage resources	44
Consulted librarian online	24

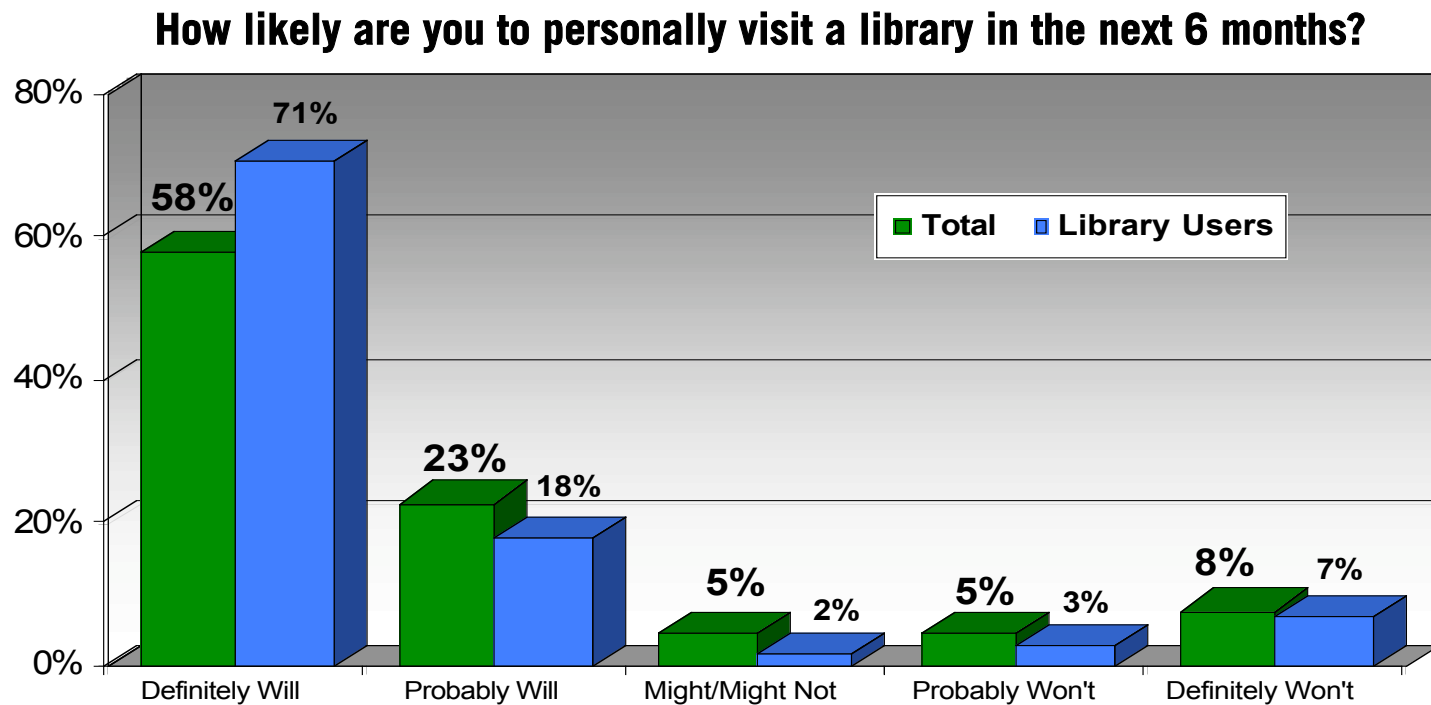
Q8. How many times have you accessed the library on the Internet in the past year? Base: 113 – access to Internet

Q9. When you've gone online to use the library during the past year, which of the following services did you use? (AIDED) Base: 70



Likelihood to Personally Visit Library Next 6 Months

- The majority intend to visit the library in the next 6 months, especially those currently using the library. The 'net' intention to visit is high, ranging from 81% to 89% of the target.

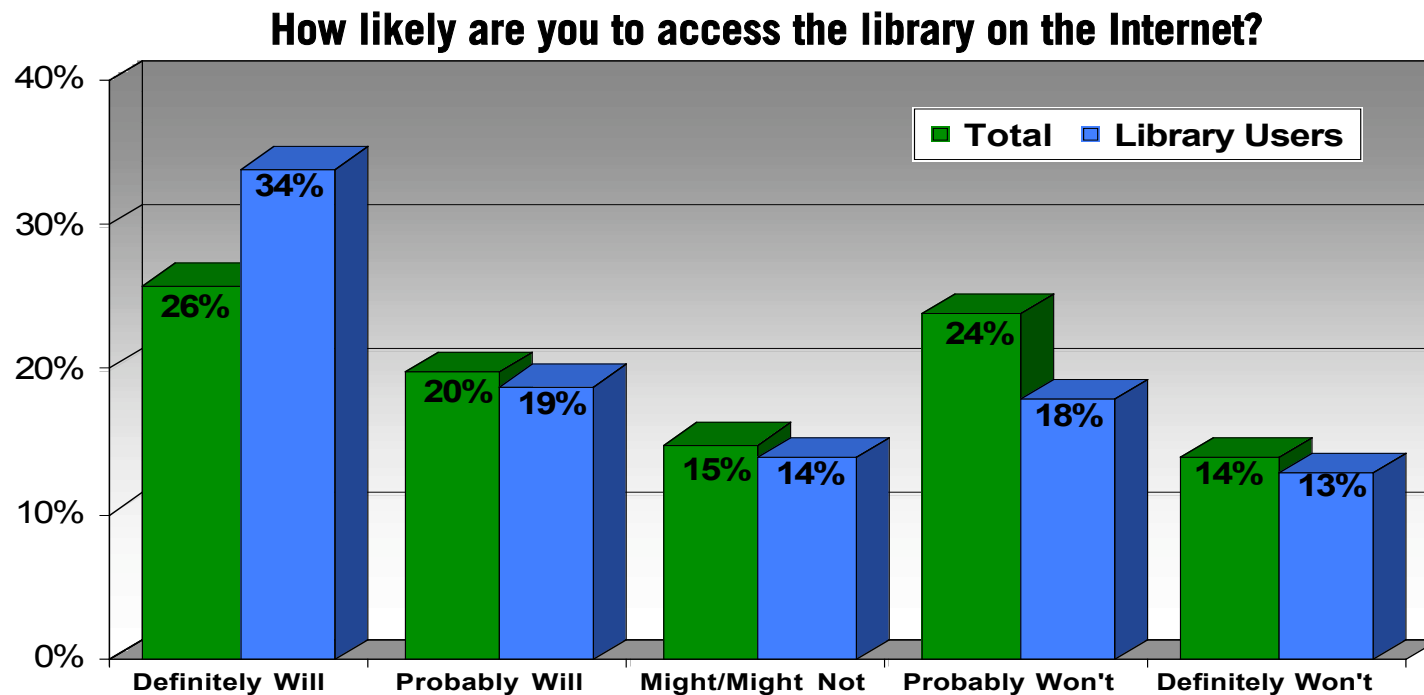


Q22. How likely are you to personally visit a library in the next six months? Would you say you... (AIDED) Base: 201



Likelihood to Access Library Online Next 6 Months

- Even though approximately half of the target intends to access the library via the Internet in the next months, there is significant potential for growth since the vast majority have access to computers.



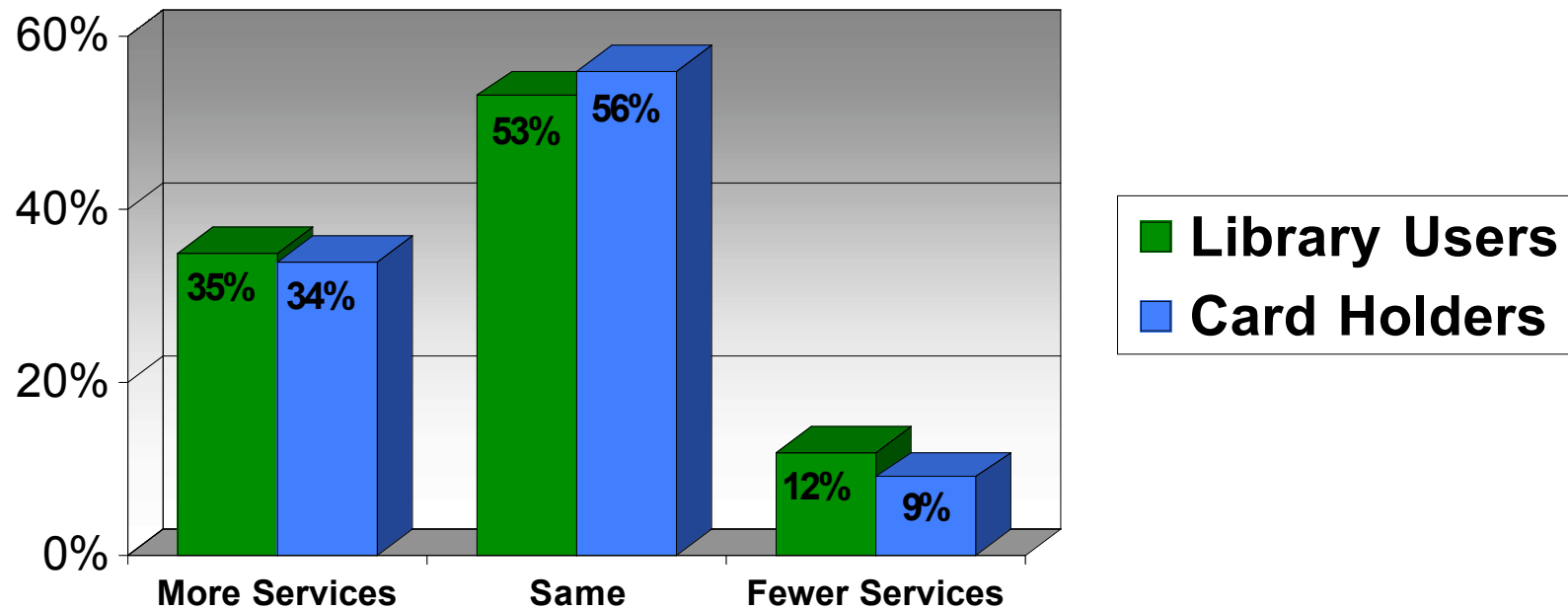
Q23. How likely are you to access the library on the Internet in the next six months? Would you say you... (AIDED) Base: 201



Level of Library Services Used vs. Past Year

- More than half used the same number of library services in the past year, while about one-third used more services.

Level of library services used this year vs. past year



Q10. Thinking about library services used this past year compared to the previous year, would you say you've used... More types of library services, The same number of library services, or fewer types of library services? User base: 120



Perceptions and Attitudes about Libraries



Top of Mind Perception

- People perceive the library as a positive place with a variety of services, and as a source for more than books, but also for knowledge and information.

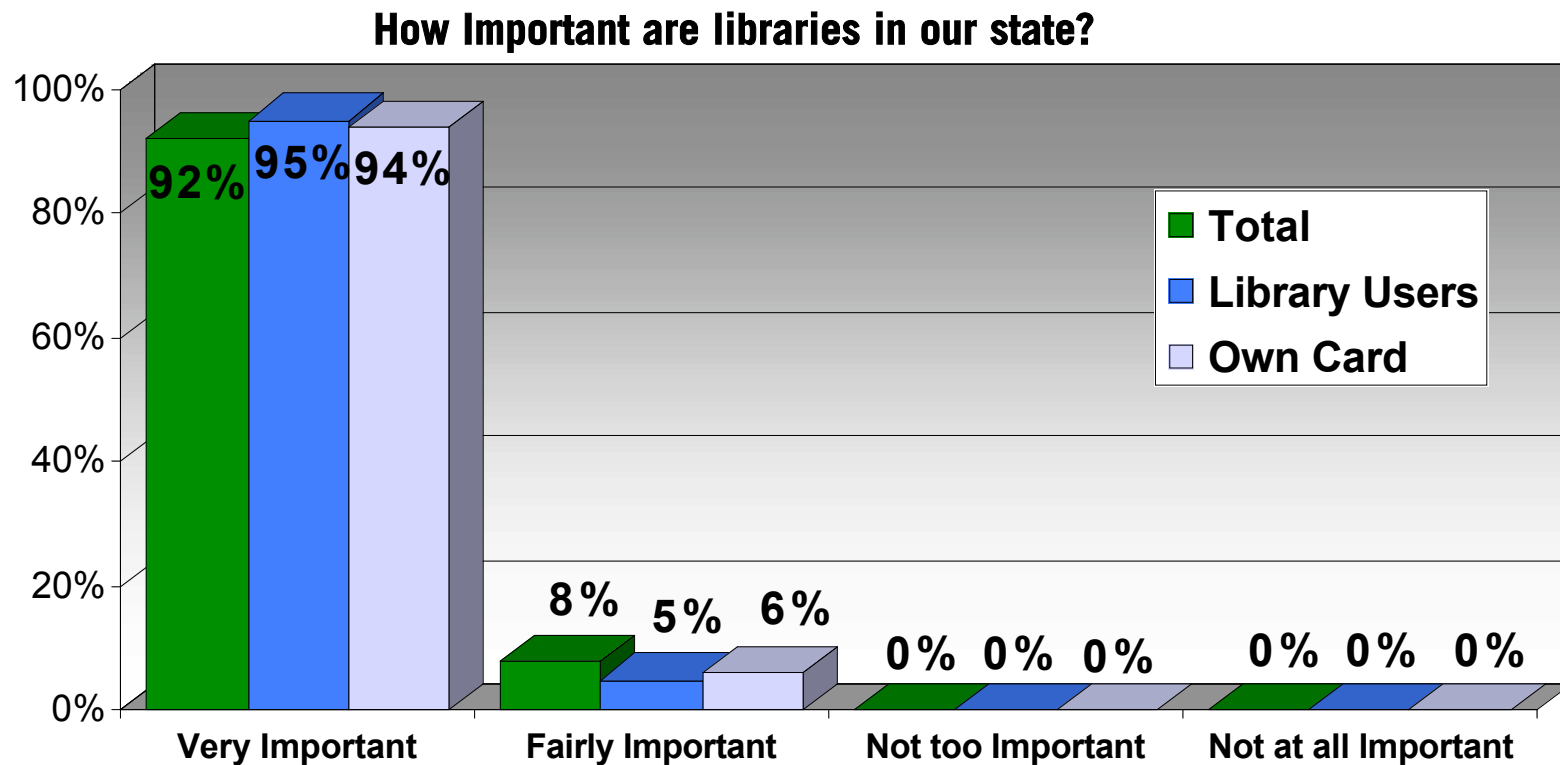
LIBRARY DESCRIPTION	OVERALL	LIBRARY USERS
Place to get/borrow books	44%	49%
Resource center/get information	43	42
Building/place full of books	34	29
Has videos/DVDs, music CDs to borrow	24	26
Has computers/use Internet	23	26
Place to learn/educational/knowledge	15	14
Free to use	14	17
Good for children	9	8
Provides entertainment/for pleasure	8	4
Has magazines/newspapers	6	9

Q2. Imagine that someone was totally unfamiliar with what a library is and does – they'd never heard of it. How would you describe the library to them? (UNAIDED) Base: 201; Users: 120



High Perceived Importance of Libraries

- People view libraries as very important – even those who do not own a library card or visit the library.



Q13. Overall, how important are libraries in our state? Are they.. (AIDED)? Overall base: 201; User base: 120



Services Most Valuable to Community

- Whether they use these services or not, people value most the ability to borrow books and find information.
- In addition, they view consulting a librarian and children's activities as very valuable to the community.

<u>SERVICE</u>	<u>OVERALL AVERAGE RATING</u>	<u>CARD HOLDER AVERAGE RATING</u>
Borrow books	4.7	4.9
Search for materials using computer catalog	4.3	4.4
Use of reference materials	4.3	4.2
Consult librarian at library	4.2	4.3
Children's activities or programs	4.2	4.2

Q11. Thinking of the services that libraries provide, how valuable are they to the community? We'll use a rating scale of 1 to 5, where 1 means 'not at all valuable' and 5 means 'extremely valuable'. (AIDED) Overall base: 201; Card holder base: 160



Services Valued by Community, con't

- Classes, workshops and programs are not perceived as highly valuable – this may be due to lack of awareness and availability.

SERVICE	OVERALL AVE. RATING	CARD HOLDER AVE. RATING
Connect to the Internet	3.9	3.9
Borrow CDs, videos, or computer software	3.9	3.9
Renew book loans online	3.8	3.9
Consult librarian by phone or email	3.6	3.7
Use other resources on library webpage	3.6	3.7
Read newspapers/magazines	3.5	3.5
Hear a speaker or attend special program/event	3.4	3.4
Take a class or workshop	3.4	3.4

Q11. Thinking of the services that libraries provide, how valuable are they to the community? We'll use a rating scale of 1 to 5, where 1 means 'not at all valuable' and 5 means 'extremely valuable'. (AIDED) Overall base: 201; Card holder base: 120



Access to Knowledge has Greatest Appeal

- People see libraries as much more than simply books and materials. What is most appealing is the less tangible – availability and access to knowledge. This is an important aspirational link that can lead to an emotional connection.

MOST APPEALING

OVERALL

LIBRARY USERS

Access to information/knowledge

45%

49%

Access to books/literature

32

36

A wide variety of resources

24

24

Free/affordable

19

21

Available to everyone/equality

10

8

An important community resource

6

8

Children's programs/child friendly

3

3

Atmosphere/quiet

3

4

Helps encourage reading

2

3

Access to computers

1

1

Q14. What is most appealing to you about libraries? (UNAIDED – all responses recorded) Overall base: 201; User base:120



Least Appealing: Limited Hours

- While people are most concerned about limited library operating hours, one-third lists no unappealing elements about the libraries. This is consistent with the high perceived value and importance of libraries.

<u>LEAST APPEALING</u>	<u>OVERALL</u>	<u>LIBRARY USERS</u>
Limited hours	15%	18%
Doesn't have what I need	7	8
Location/access/parking	5	3
Hard to find books/not user friendly	4	4
Just don't think of it	4	3
Uncensored Internet access	4	4
Homeless people	2	3
Too quiet	2	3
Other*	23	13
None/Don't Know	35	33

* *Other includes: crowded, not relevant to me, late fees, stuffy, under-funded, noisy, too few computers)*

Q15. What do you like least about libraries? (UNAIDED – all responses recorded) Overall base: 201; User base: 120



Making Libraries More Valuable

- While larger selection is viewed as a way of making libraries more valuable, it is possible that people do not realize that they can access books and materials beyond their local branch. It is important to convey the availability and power of online access.

<u>FEATURES/SERVICES</u>	<u>OVERALL</u>	<u>LIBRARY USERS</u>
Larger selection	17%	20%
More open hours/hours of operation	17	18
Location closer to my home/more convenient	5	2
Nicer facilities	3	3
More children's programs	3	4
More/better parking	2	3
Easier to use	2	3
More services	2	4
Nothing/Don't Know	41	38

Q16. What would make the libraries more valuable to you? (UNAIDED – all responses recorded) Overall base: 201



Characteristics that Describe Libraries

CHARACTERISTIC	DESCRIBES VERY WELL
Free/affordable	88%
Valuable	84
Something for everyone	73
Helpful	69
Safe	55
Welcoming and friendly	55
Accessible	49
Easy to use	47
Sense of community	44
Comfortable	44
Convenient	41
An appealing environment	41
Up-to-date technology	40
Fun	38
Entertaining	30
Innovative and progressive	27

- People strongly believe that libraries provide high value as well as being 'free/affordable'.
- They don't, however, perceive libraries as necessarily being convenient, providing an appealing environment, or being innovative and progressive.

Q19 Please tell me how well each of the following characteristics describes libraries. We'll use a rating scale where 1 means 'it does not describe libraries at all' and 5 means 'it describes libraries very well.' (AIDED) Base: 201



Library Characteristics vs. Importance

CHARACTERISTIC	DESCRIBES VERY WELL	IMPORTANCE 1st, 2nd, 3rd CHOICE
Free/affordable	88%	40%
Valuable	84	15
Something for everyone	73	28
Helpful	69	28
Safe	55	21
Welcoming and friendly	55	6
Accessible	49	36
Easy to use	47	20
Sense of community	44	11
Comfortable	44	13
Convenient	41	33
An appealing environment	41	5
Up-to-date technology	40	18
Fun	38	11
Entertaining	30	5
Innovative and progressive	27	8

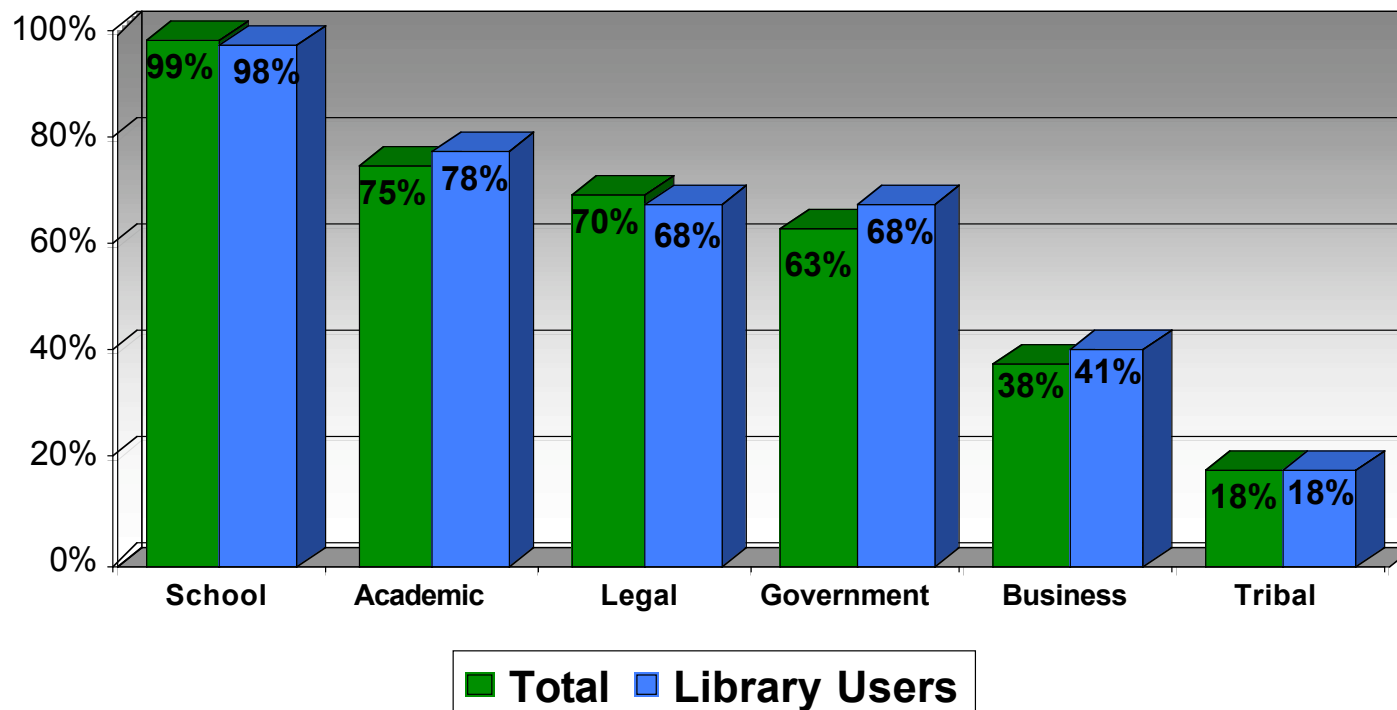
Approximately one-third view accessibility and convenience as important, yet less than half believe those characteristics describe libraries. Awareness of online access may help close this gap.

Q19 Please tell me how well each of the following characteristics describes libraries. We'll use a rating scale where 1 means 'it does not describe libraries at all' and 5 means 'it describes libraries very well.' (AIDED) Base: 201



Awareness of Library Types

- Beyond public libraries, people have the highest awareness of school libraries, and the lowest awareness of business and tribal libraries.



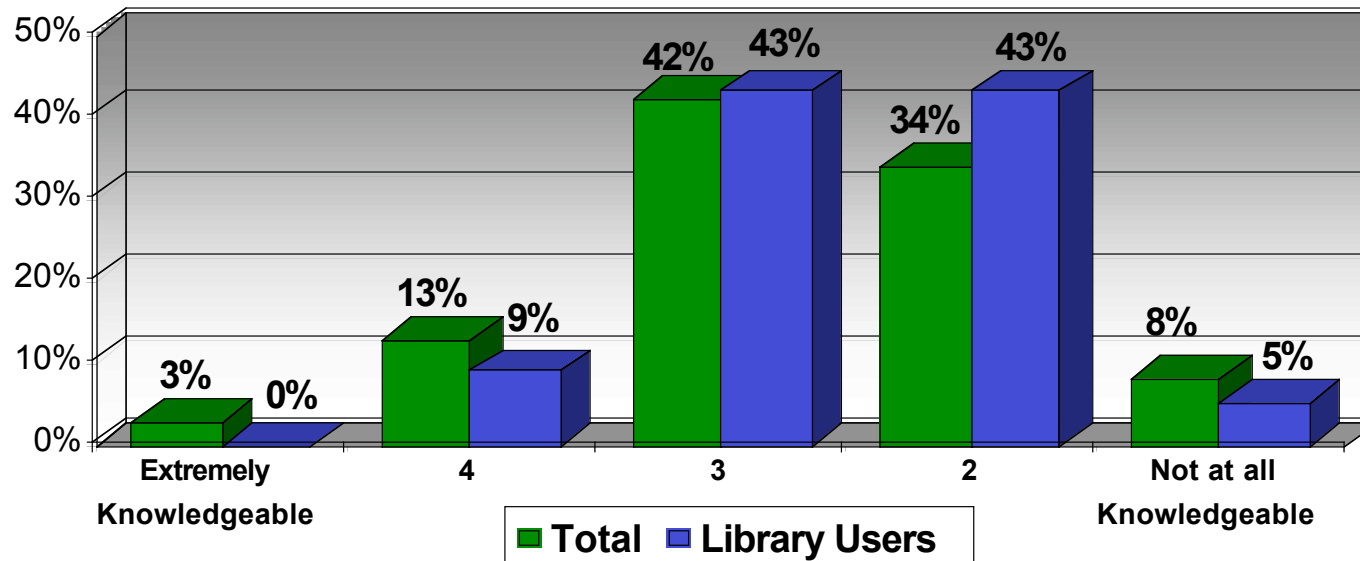
Q21. In addition to public libraries, what other types of libraries are you aware of? I will read a list, a please tell me whether you are aware of each one. (AIDED) Overall base: 201; User base: 120



Perceived Knowledge about Libraries

- While people highly value libraries, they do not believe they are knowledgeable about all the available services. This is true even for those who currently use libraries. There is significant opportunity to educate about the variety of library offerings and benefits in order to strengthen loyalty, repeat use, and support.

How knowledgeable are you about available library services?



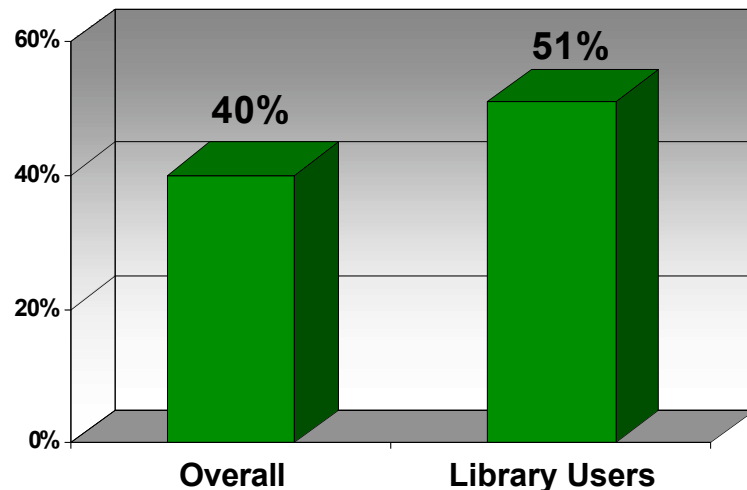
Q24. Overall, how knowledgeable do you feel you are about all the library services that are available? On a scale from 1 to 5, with 1 being 'not at all knowledgeable' and 5 being 'extremely knowledgeable', how would you rate your knowledge level about library services?) Base: 201



Advertising Awareness & Message Recall

- The advertising/PR messages recalled are primarily focused on specific events and features, and not on the benefits that libraries provide.

AWARE OF ADVERTISING/PR



MESSAGES RECALLED

■ New library/construction (Primarily Western WA)	41%
■ Programs/events/kids	12
■ Libraries help you learn	7
■ Levy/bond/budget issues	6
■ Libraries provide access to information/knowledge	7
■ Hours	4
■ Libraries provide more than just books	2
■ Online services	2
■ Nothing/Don't Know	10

Q17. In the past 6 months, have you seen, heard or read any advertising or news articles about libraries? Overall base: 201; User base: 120

Q18. What did the advertising say or show you? (UNAIDED) Base: 160



Conclusions & Implications



Conclusions – Visits & Usage

- The majority of the target group owns a library card (80%), and 68% of library card owners visited a library either in person or online in the past year.
- 94% of the target has access to the Internet, and of those, 60% have accessed the library online.
- People personally visited libraries an average of 22.2 times in the past year, and they visited online an average of 19.0 times. With both types of visits, 10% have accessed the library more than 50 times in the past year.
- The service most used during personal library visits is to borrow books (90%), followed by consulting a librarian (68%). For online visits, the primary service used is using the computer catalog (90%), with 49% renewing books online.
- Accessibility and convenience are library characteristics most important to people, yet they don't necessarily believe libraries deliver on those features.
- 81% of the target intends to personally visit a library in the next six months, while 46% intend to access the library online. This increases to 89% and 53%, respectively, when referring to current library users. However, online users have a lower rate of intent to visit – there is opportunity to improve their experience as well as awareness of online library access.



Conclusions – Attitudes & Perceptions

- **People perceive libraries as much more than simply books and materials. What is most appealing is the less tangible – the availability and access to knowledge and information.**
- **The vast majority of library users (95%) view libraries as ‘very important.’ This also holds true for those who have not visited the library in the past year (86%).**
- **Whether they use library services or not, people value most the ability to borrow books, to find information, and to consult the librarian. They also view children’s activities as very valuable to the community.**
- **While ‘larger selection’ is viewed as a way of making libraries more valuable, it is possible that people do not realize that they can access books and materials beyond their local branch. It is important to convey the availability and power of online access.**



Conclusions – Attitudes & Perceptions, con't

- While one-third list 'accessibility' and 'convenience' as important library characteristics, they don't necessarily believe libraries deliver on those features. While it may not be possible to increase hours of operation, it IS possible to access the libraries 24/7 via the Internet. (94% have Internet access.)
- Beyond public libraries, people have the highest awareness of school libraries, and the lowest awareness of business and tribal libraries.
- While people highly value libraries, they do not believe they are knowledgeable about all the available services. This is true even for those who currently use libraries. There is significant opportunity to educate about the variety of library offerings and benefits in order to strengthen loyalty, repeat use, and support.
- Awareness of advertising and PR messaging is scattered, and most notably focused on construction of the new Seattle library in the Western part of the state.



Marketing Implications

- **Attitudes and perceptions are very similar among the overall target and library card holders and patrons. Therefore, consistent messaging can be effective for both current and potential library users.**
- **People value the library system as a source of knowledge and information. This positive perception is broader than seeing libraries simply as repositories of books. It connects with people's desire to learn and grow their minds. Messaging must reflect this level of thought and aspiration.**
- **Since people do not view themselves as very knowledgeable about the services that libraries offer, there is significant opportunity to educate them about the variety of library offerings and benefits in order to strengthen loyalty, repeat use, and support.**



Marketing Implications

- **There is great potential to capitalize on Internet access to libraries. While this should not be the primary message, it is important to make people aware of the library's online availability and to make it simple to use. This access addresses 3 key issues:**
 - **Limited hours of operation - Internet is accessible 24/7**
 - **Desire for large selection of materials - materials at all libraries can be accessed vs. being limited to those at a nearby library**
 - **Lack of knowledge about library services – Internet offers a timely and cost efficient means of educating patrons about library offerings and benefits.**
- **The target is not currently aware of a concise, benefit-oriented message regarding libraries. It is important that the WSL campaign is relevant and compelling in order to maximize effectiveness and use of limited resources.**



Demographics



Employment

	<u>TOTAL</u>	<u>LIBRARY USER</u>
Full time	59%	57%
Part time	13	14
Not employed outside the household	28	28

Q25 Which of the following best describes your current employment? (AIDED) Base: 201 Library User Base: 120



Education

	<u>TOTAL</u>	<u>LIBRARY USER</u>
Some high school or less	3%	3%
High school graduate or equivalent	12	7
Vocational, business or technical school	12	8
Some college/associates degree	30	33
College graduate/bachelors degree	27	28
Postgraduate work/degree	15	20

Q26 Which of the following best describes your level of education to date? (AIDED) Base: 201; Library User Base: 120



Annual Household Income; Gender

<u>HH INCOME</u>	<u>TOTAL</u>	<u>LIBRARY USER</u>
Under \$20,000	3%	3%
\$20,000 - \$34,999	11	7
\$35,000 - \$49,999	17	16
\$50,000 - \$74,999	20	24
\$75,000 - \$99,999	17	17
\$100,000 or more	12	14
Don't Know/Refused	15	19

<u>GENDER</u>		
Female	60%	61%
Male	40	39

Q27. For classification purposes only, which of the following categories best describes your household's total, combined income in 2003? (AIDED)
 Base: 201; Library User Base: 120



Age

RESPONDENT

TOTAL

LIBRARY USER

25 – 34 years

32%

25%

35 – 44

39

41

45 – 54

23

26

55 – 64

6

8

CHILDREN IN HOUSEHOLD

Under 5 years

38%

33%

5 – 9

37

38

10 – 14

46

50

15 – 18

32

37

S4. We need to talk with people from a variety of different ages. Which of the following categories best describes your age? AIDED) Overall base: 201; User Base: 120

S5. What are the ages of the children living at home? Overall base: 201; User Base: 120

